

COVID-19 Community Team Outreach Tool Using CCTO to Document and Monitor Case Patients



Understanding the “Contact or Case Patient” Field

The **Contact or Case Patient** field locks the first time a profile is saved, and it documents whether someone *entered* the system as contact or a case patient. This will always remain locked on either “Contact” (even for contacts who test positive during their monitoring period) or “Case Patient” (for cases who are entered manually into CCTO or who flow in from NC COVID). **All of this is correct, and no further action on this field is required.** If you are required to continue monitoring on a contact who tests positive, you will close out the “Contact” profile and use a new “Case Patient” profile to record their isolation monitoring. **Read on for details.**

Record Information

Contact or Case Patient * Contact

Documenting Monitored Contacts Who Test Positive

When an existing contact tests positive for COVID-19, complete the following actions:

1. Complete all fields under the contact profile **Testing Details** section.
2. Defer to your local guidance on any other actions required before closing this profile. When you close this profile, select the FMO of **“Contact Tested Positive During Monitoring.”** Close and deactivate this profile per the job aid.

If your local guidance requires that this person continue monitoring after their profile has been closed and deactivated, **they should continue to be monitored within a new profile labeled as a case patient.** See the following pages for guidance on:

- **Option 1:** Continuing monitoring via a new case profile that flows from NC COVID.
- **Option 2:** Continuing monitoring on a cloned profile that is labeled as a case patient (if an NC COVID profile is not available).

1 Testing Details

Referred to Test?	Yes
Referred to Test Date	4/13/2021
Tested?	Yes
Test Date	4/15/2021
COVID-19 Test Result	Positive
NC COVID Diagnosis Date	---

Complete Testing Details

2 Final Monitoring Outcome

Contact Tested Positive During Monitoring

Close as “Contact Tested Positive During Monitoring”

(NC COVID Diagnosis Date is a field that is used on profiles of individuals who enter the system as cases, and you do not need to touch this field.)

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Option 1: Continue Monitoring Through a Flowed Profile

- Most cases entered into NC COVID will flow automatically into CCTO to be sent automatic digital notification ([see job aid](#)), including case patients who were already being monitored as contacts in CCTO per the last section. Currently, there is no state-level requirement to review, monitor, or close out these cases in CCTO. There is also no requirement to enter cases manually.
- **If your local protocol requires monitoring within CCTO on a contact who tests positive and becomes a case, you should do this on a new profile labeled "Case Patient."** Ideally, this will be the profile that has flowed from NC COVID. See the process below.

If an individual who is currently being monitored in CCTO has tested positive for COVID-19, they will be entered into NC COVID as a case patient. This NC COVID record will then flow into CCTO and be **notified automatically if key requirements are met**. This creates a new CCTO profile labeled as a case patient on which you can continue monitoring if required:

1. When an NC COVID case patient record arrives in CCTO under this individual's name, there may be a duplicate warning* on the individual's existing contact profile. **Ensure this contact profile is updated and closed as "Contact Tested Positive During Monitoring"** per the previous section.
2. Locate the individual's new case profile that has flowed from NC COVID and **assign it to yourself**. (You may wish to search the "All Cases Imported from NC COVID" view. If the profile is not yet available, check again in 12-24 hours or see Option 2 on the next page.)
3. **Connect this profile** to the individual's closed contact profile, transfer over any missing information, and continue monitoring on the case profile as normal. See the [Connecting Contacts](#) and [Cloning, Connecting, and Deduplicating](#) job aids for more information.

1

Read-only This record's status is inactive

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Contact · MDA Form

CCTO Contact Assessments All Activities Recent Monitoring History

Record Information

Contact or Case Patient	Contact
C#	C-0000990373
Event #	1
Case-Patient NC-COVID Event ID	105483803

Monitoring Details

Begin Monitoring?	No
Monitoring Status	Monitoring Ended
Monitoring End Date	5/5/2021
Final Monitoring Outcome	Contact Tested Positive During Monitoring
Monitoring Age	---

Update and close the contact profile

**This duplicate warning is caused by inefficiencies with the system and unfortunately cannot be resolved.*

2

Save Save & Close + New Clone Deactivate Connect Assign

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Contact · MDA Form

CCTO Contact Assessments All Activities Re

Record Information

Contact or Case Patient	Case-Patient
C#	C-0000990372

Begin Monitoring?

Monitoring Status

Reassign case profile that flowed from NC COVID

3

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Contact · MDA Form

CCTO Contact Assessments All Activities Recent Monitoring History

Connected To ↑ ↓

Event # (Connecte... C# (Connecte

Oliver 10 Twist 1 C-00009903

Connect the profiles and continue monitoring

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Option 2: Continue Monitoring on a Cloned Profile

If directed by your local protocol, you can also continue monitoring a contact who has tested positive by cloning their deactivated contact profile and labeling the resulting new profile as a case.

This method does not require the use of an NC COVID profile and may be done to ensure that documented outreach to the case is not delayed.

1. Ensure the profile of the contact who has tested positive has been **updated and closed** as "Contact Tested Positive During Monitoring" per the previous section.
2. **Clone this profile** per the guidance in the [Multiple Exposures](#) and [Cloning, Connecting, and Deduplicating](#) job aids.
3. In the new profile, toggle the "Contact or Case Patient" field in the **Record Information** section to "**Case-Patient.**" Be sure to select the correct value as this field will lock upon saving and cannot be changed.
4. If it is available, enter the Event ID of the case in the "**Case-Patient NC COVID Event ID**" field. This field only displays the Event ID of the individual to whom this profile belongs, *not* of the source patient. (*In situations when a contact is being entered instead of a case patient, this is left blank.*)
5. Within **NC COVID Diagnosis Date**, enter the case's diagnosis date (date of the case's positive lab), which should be confirmed in NC COVID if available. This will lock immediately upon entry.

1 Update and close the contact profile

2 Clone the inactive profile

3 Select "Case Patient" on the new profile

4 Enter the Case Patient NC COVID Event ID if available

5 Enter Diagnosis Date

The screenshots show the CCTO interface for a contact named Minnie Mouse. Step 1 shows the 'Record Information' section with 'Contact or Case Patient' set to 'Contact'. Step 2 shows the 'Clone' button being clicked. Step 3 shows the 'Record Information' section with 'Contact or Case Patient' set to 'Case-Patient'. Step 4 shows the 'Case-Patient NC COVID Event ID' field being populated with '123456789'. Step 5 shows the 'NC COVID Diagnosis Date' field being populated with '7/19/2021'.

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Only if required: Manual Case Patient Entry

Manual entry and monitoring of cases into CCTO is **not required**; however, if it is recommended by your local guidance, you may enter a new case patient who is not a current contact into CCTO:

1. Follow the guidance outlined in the Entering a Contract micro-training to complete as much information as possible. *You should not need to fill in the "NC COVID Source Patient Event ID" or "Last Date of Exposure" fields.*
2. Toggle the "Contact or Case Patient" field in the **Record Information** section to "**Case-Patient**." Be sure to select the correct value as this field will lock upon saving, and cannot be amended.
3. In the same section, enter the **Event ID** of the case in the "Case-Patient NC COVID Event ID" field. This field only displays the Event ID of the individual to whom this profile belongs, *not* of the source patient. *(If a contact is being entered instead of a case patient, this is left blank.)*
4. Enter the case's **Date of Birth**. This is a required field for all case patients and helps them utilize the portal for notified cases.
5. Finally, within **NC COVID Diagnosis Date**, enter the case's diagnosis date (date of the case's positive lab), which should be confirmed in NC COVID if available. This will lock immediately upon entry.

1 Create a new profile

New Contact
Contact · MDA Form

CCTO Contact Assessments All Activities Recent Monitoring Hist

Record Information

Contact or Case Patient * ---

2 Select "Case Patient"

Record Information

Contact or Case Patient * --Select--

C# --Select--

Event #

Case-Patient NC- COVID Event ID

Contact

Case-Patient

3 Enter the Case Patient NC COVID Event ID

Record Information

Contact or Case Patient * Case-Patient

C# ---

Event # 1

Case-Patient NC- COVID Event ID * 123456789

4 Enter the Case Patient DOB

Date of Birth (DOB) * 1/1/2000

5 Enter the Diagnosis Date

NC COVID Diagnosis * 7/19/2021

Date